CRELoaded Point of Sales Module With Inventory Management

Table of Contents

Introduction: -

Point of Sales (POS) module is a plug-in created for the **CRE Loaded 6 x** applications. It helps to create, maintain & update Product sale data, Customer information, Order information, Service information and Inventory details. It has three main features.
The features are:-

1. Sales.
2. Service.
3. Inventory.

This document is a User Guide describing all the possible functions of these three features.

How to Access POS:-

After Logging In as the administrator of **CRE Loaded** software, a "*Menu Bar*" appears on the left hand side of the home page.

Click on the **POS** option to view the features. By default the "**sales"** page appears along with the links of "Service" & "Inventory".

Sales:-

This feature of the plug in allows you to create sales order for existing and first time customer, search an existing customer, adds a new customer & also to print invoice of a sale made. All these function are described in this section of the document. After clicking on "**Sales"** these two options appears:-

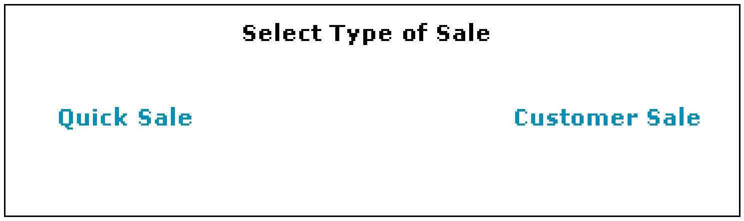

Figure 1: Sales Screen

Click on Quick Sale to create an order and to print the invoice without registering the customer.

Quick Sales:-

Table 1: Fields of Quick Sales Screen

Fields	Description
Enter Product Model	Enter the model number of the product purchased, then press the **ENTER** button.
SKU	Shows the product model number.
Description	Shows the description of the product.
Qnty	Shows the number of products purchased.
Tax	Enter the amount of tax to calculate the total payment.
Price	Shows the price of the product.
Dsc %	Enter the amount of discount on the price of the product.
Total	Shows the total amount to be paid including tax and excluding the discount.

After filling in the above fields click on the "**Payment**" button to go to the next page.

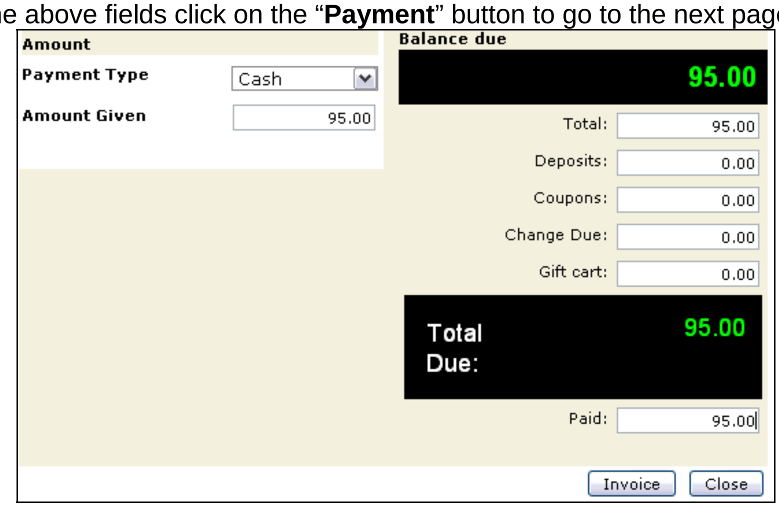

Figure 2: Payment Page

Select the method of payment in the Payment Type drop down box. The options are **Cash**, **Debit**, **Check**, **Visa** and **MasterCard**.
Click on the "**Close**" button to close the window.
Click on the "**Invoice**" button to print the invoice.

Customer Sales:-

This function allows you to search existing customers, add new customers and to generate new orders.

Table 2 : Fields of Customer Sales

Fields	Description
Enter Customer First Name	Enter the first name to search customer
Enter Customer Last Name	Enter the last name to search customer
Enter Customer Telephone	Enter customer phone number to search customer
Select Customer	Click to view the complete list of existing customers.

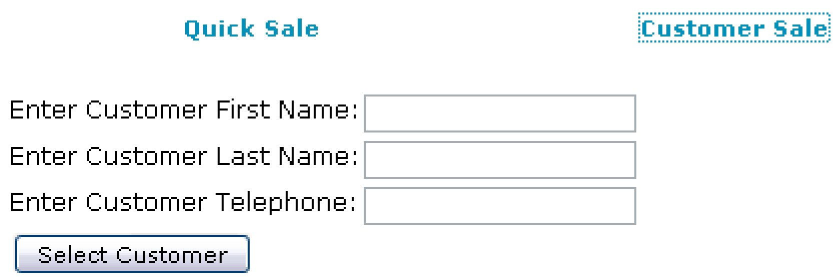

Figure 3: Select Customer Fields

Search a Customer:-

To search an existing customer enter the name and click on "**Select Customer**". The list of customers with the name appears with corresponding phone numbers. Click on "**Select**" option to view the details of a particular customer. Complete customer details will appear. Click on "**Confirm**" button to confirm the customer data.

Figure 4: Search Result

View all Existing Customers:-

To view the complete list of existing customers click on "**Select Customer**" keeping the above three fields blank. See Figure 3. The list of all existing customers appears. Click on "**Select**" option to view details of a particular customer. Then, Click on the "**Confirm**" button to confirm the customer data.

Add a New Customer:-

To add new customers click on "**Add New Customer**". A form will appear where customer data is to be filled.

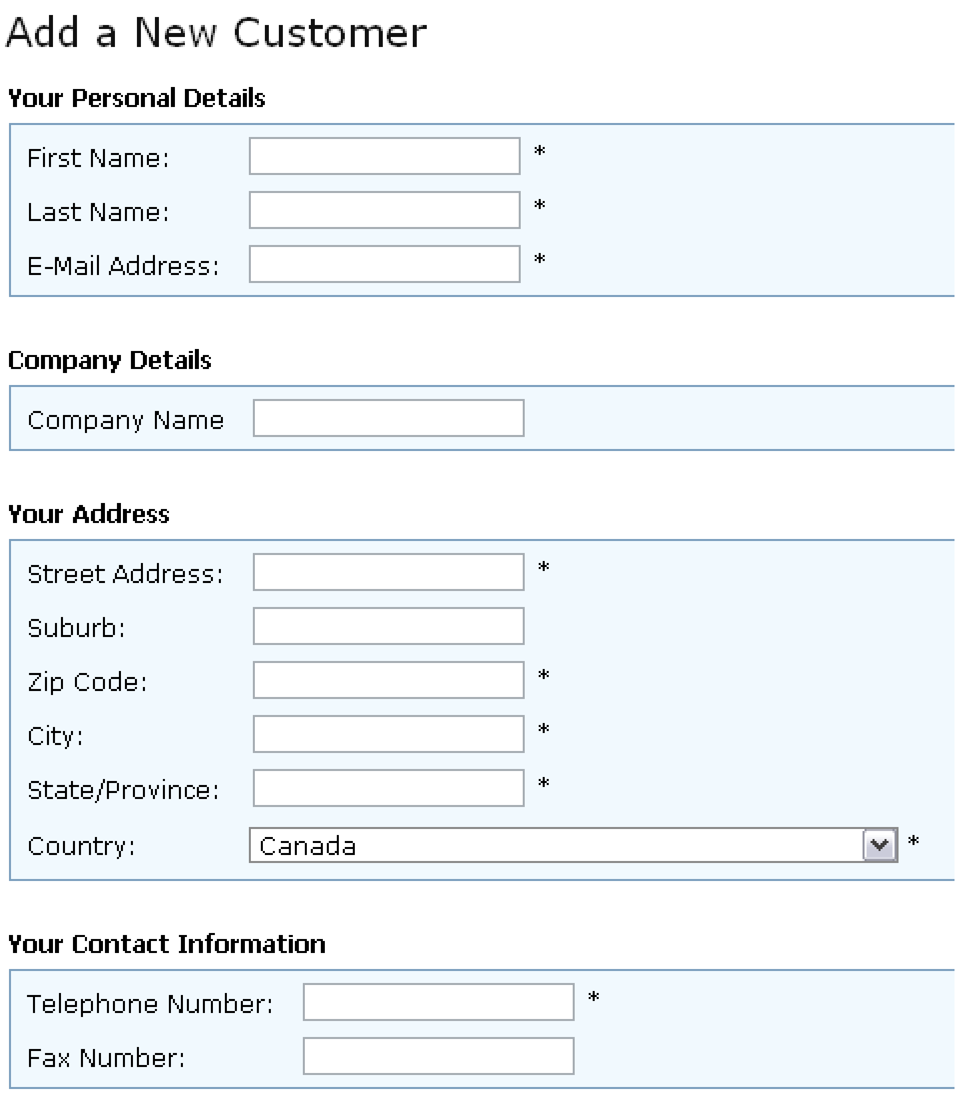

Figure 5: Form for Customer Data

After completing the form click on "**Add**" button.

Note: - In the form the fields marked in * sign are mandatory to fill.

The confirmation page appears. Click on "**Confirm**" button to confirm the customer.

New Order Page:-

A new order page will appear. Fill in the address details of the customer. To place the order the fields are same as
Table 1.

Note: - If the shipping address and billing address are different uncheck the check box.

Services: -

This function of the POS module allows you to create new service orders, update existing service orders & to print invoice of service orders.

Create a New Order:-

POS allows you to create a new service order for both existing customers & new customers.

Service Order for Existing Customers:-

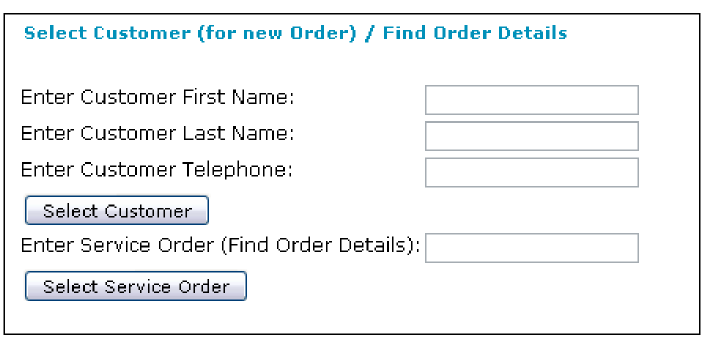

Figure 6: Services Home Page

To create a service order for an existing customer enter the first name of the customer, last name of the customer or the telephone number of the customer and click on "**Select Customer**". See.

To view the complete list of existing customers click on "*Select Customer*" keeping the above three fields blank.
Click on "**Select**" to view the details of the customer. Along with details of the customer the page also shows the previous service orders of the customers at the bottom. Click on "**Select**" to update the existing service orders. OR, click on "**New Service Order**" to create a service order. The page containing the address details of the customer appears. Make the necessary changes if any and click on "**Update**" to change the address details. Then enter the service details of the customer. To check the details of the fields & buttons of the screen see Table 3.

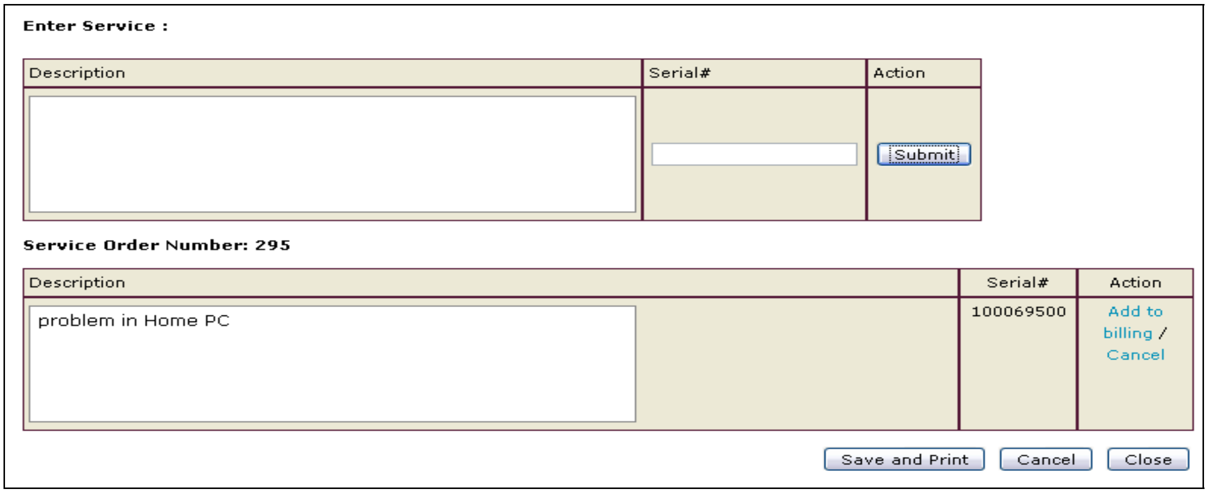

Figure 7: Enter Service Details

The additional field present in this screen is "**Add to billing/ Cancel**". Click on cancel to cancel the order description. Click on "Add to billing" to check the total cost charged for the service. After clicking the "Service Price List" appears (see

Table 4).

Then click on "**Payment**" to view the payment details. Click on "**Invoice**" to print the invoice of the service order (See Figure 2).To add an item from the inventory click on "**Add Item from Inventory**".

Service Order for New Customers:-

To create an order for new customers click on "**Add New Customer**" and follow the steps to fill in the form of customer details. Then click on "Add". Then click on "**Select Customer (for new Order) / Find Order Details",** the main screen of the service page appears. Enter the first name or the last name of the customer to find the customer and click on "**New Service Order**".
NOTE: - Only two fields in this form are mandatory.

To update an existing service order enter the service order number in the "**Enter Service Order**" field and click on "**Select Service Order**". The screen will show the address details of the customer. Then the option of updating the service order is shown. The fields are:-

Table 3: Fields of Entering Service Details

Fields	Description
Description	Enter the description of the problem.
Serial #	Enter the serial number of the product.

Submit	Click to save the service details.
Save & Print	Click to print the service order.
Close	Click to close the window.

Then the details of the existing service order is shown:-

Table 4: Fields of Service Price List

Fields	Description
Delete	Click to delete a service.
Description	Shows the description of the current service.
Serial #	Enter the serial number of the product.
Price	Shows the cost of the service.
Tax	Shows the Tax added for the service.
Dsc %	Shows the discount provided on the total cost.
Total	Shows the total cost of the service.
Add items from inventory	Click to close add products from the inventory.
Payment	Click to process the payment.

The payment page shows the total amount of payment to be done. Click on "**Invoice**" button to print the invoice. Click on "**Close**" to exit from the window.

Inventory:-

This feature allows you to create & to keep a track record of the purchase orders. It also has the facility to add new items in the existing purchase orders.

The two functionalities of Inventory are:-

1. Create Purchase order.
2. Add Items to Inventory.

Create Purchase Order:-

"**Create Purchase Order**" allows creating, saving & printing a new purchase order. It generates an order number for future reference. In the Inventory page click on **"Create Purchase Order",** the following page appears.

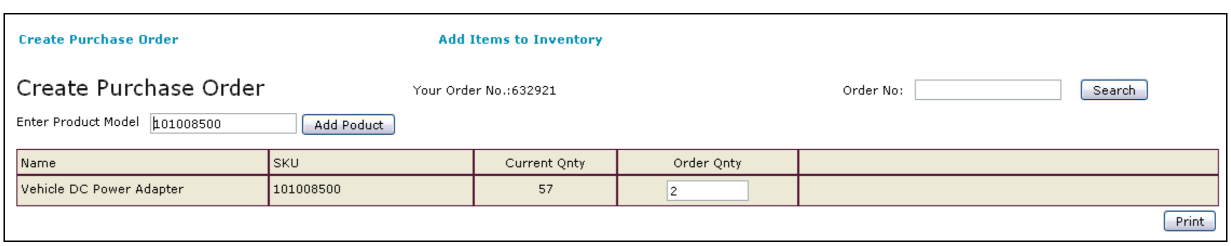

Figure 8: Create Purchase Order

Table 5: Fields and Buttons of Purchase Order

Fields	Description
Enter Product Model	Enter the model number of the product. Then click on "**Add Product**".
Name	Shows the name of the product.
SKU	Shows the model number of the product.
Current Qnty	Shows the number of products available.
Order Qnty	Enter the number of products to be ordered.
Print	Click the button to print the purchase order.
Order Search	Enter an existing purchase order number and click "**Search**" to view the order details.
Your Order No	Shows the new order number generated.

Add Items to Inventory:-

This function allows to check the status of the order and to print the barcode stickers of the product. Multiple stickers can be printed at once.

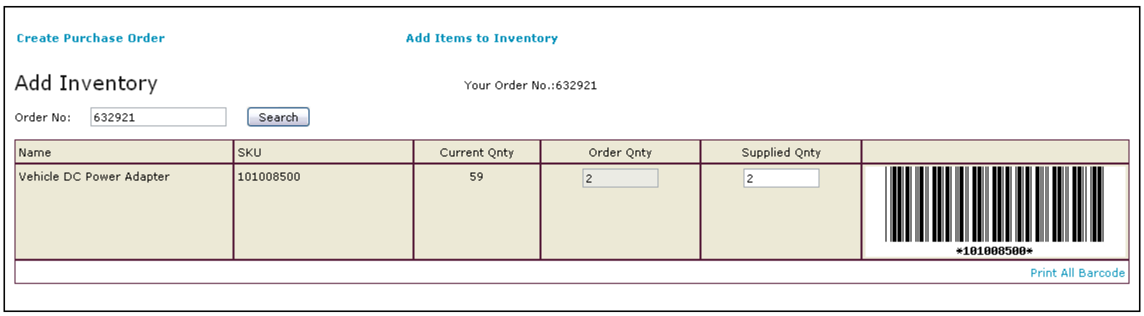

Figure 9: Add Inventory Page

Table 6: Fields of Add Inventory

Fields	Description
Order No.	Enter the order number and then click on Search button to view the details of the order.
Name	Shows the name of the product.
SKU	Shows the model number of the product.
Current Qnty	Shows the current quantity.
Supplied Qnty	Shows the number of products supplied.
Bar Code Sticker	Shows the bar code sticker and the model number of the product.
Print All Barcode	Click to print the barcode sticker. It is directly proportional to" Supplied Qnty".
Your Order No.	Shows the current order number.

Table of Figures:-

List of Tables:-

INDEX:-